FSA.

FOOTBALL SUPPORTERS' ASSOCIATION

WOMEN'S GAME SUPPORTERS SURVEY 2024

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INTRODUCTION

The FSA is pleased to publish the results of our second comprehensive survey which documents the attitudes and experiences of football fans across a wide range of issues throughout the women's game.

As our work in the women's game continues to grow, we want to continue to gather opinions from supporters, and to capture a comprehensive picture on everything from fans' matchday experiences to thoughts on the way broadcast deals have impacted the women's game; views on how clubs engage with their fanbase to on-the-pitch issues and competition structure, and everything in between.

The 2024 survey has seen a 50%+ increase in respondents, echoing the growth not only in support for the women's game but also within the membership of the FSA and our Women's Game Network.

Our surveys allow us to benchmark and track changing attitudes on key issues, as well as keeping up to date with new developments specific to the women's game as they arise, helping inform our campaigning and work in women's football.

Our thanks go to partners across the game including the FA, PGMOL, Level Playing Field, NewCo, Anika Leslie Walker and the all fans who helped us in shaping the survey, and to Alamy for images in this document.

Thank you to all the supporters who completed the survey, it has once again highlighted significant issues across the pyramid. We will use the findings documented on the following pages to support the FSA's work in advocating for supporters across all levels of the women's game, as well as to identify the focus for new areas of work.

We will work with key stakeholders, alongside the members of the FSA's Women's Game Network and our Fans for Diversity campaign, to ensure that topics such as discriminatory behaviour and increasing the diversity among the fanbase are tackled.

2024 is another big year for women's football - we will be working closely with NewCo, the new organisation responsible for the development of the women's professional game, while ensuring we don't lose focus on the wider pyramid.

We will also be playing a key role in the DCMS implementation group for the Carney Review recommendations. Our survey results are pivotal to a number of these areas of work and we will strive to ensure that supporters continue to be comprehensively engaged in the future.

Deborah Dilworth,
FSA Head of Women's Football

DEMOGRAPHICS

WHO COMPLETED OUR SURVEY?

The survey ran online between the 5th and 22nd February 2024, and was completed by 3,474 supporters from across the women's game.

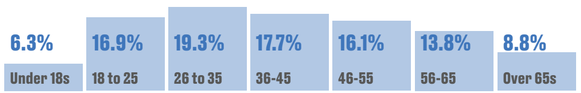
Supporters from **47** of the **48** clubs which make up the top four divisions in the women's game (Women's Super League, Championship, National League Northern and Southern Premier Divisions) were represented, as well as fans from further down the pyramid.

86.8% of those who supported a club in the top four divisions followed a WSL team.

The majority of our respondents were women, outnumbering men by almost two to one - **63.5%** to **33.4%** - with a further **1.3%** identifying as non-binary. The remainder either self-identified as another gender, or preferred not to give a response to that question.

This marks a change from our 2022 survey, in which the gender split was more even, skewing **52-44** in favour of men.

STAT: The age profile of our respondents was evenly split across all age groups



ETHNICITY

In terms of ethnicity, our cohort of respondents was similar to our 2022 dataset - the majority of respondents identified as White British, with just over 80% saying they were wholly or partly from that ethnic background.

A further 9.7% came from White (Other) backgrounds, and 3% were of White (Irish) ethnicity. African, Caribbean and Indian each accounted for between 1.2 and 1.3% of respondents' ethnicities.

STAT: Just over one in eight respondents (12.9%) indicated that they considered themselves to have a disability.

CRUNCHING THE NUMBERS

Throughout our report, not all the percentages you'll see for all questions will add up to **100**. When reporting figures we have rounded responses to one decimal place for clarity. In other questions, there were options for **'prefer not to say'** or **'don't know/not sure'**, or respondents were allowed to select multiple options from a list. All of which means that the numbers may not always make sense at first glance, but we promise that they are correct.

PARTISANSHIP

One of the main aims of our survey is to benchmark the supporter culture in the women's game. The growth of the game in the past decade or so means it has attracted a range of new supporters from different routes – some coming from an existing background in supporting men's teams and others who have come directly to women's football - building on an established core of supporters who have followed women's football for decades.

Firstly, we wanted to establish if the level of partisanship seen in the men's game replicated itself in women's football.

STAT: Which of the following best describes your support in women's football?

56.6% I am a fan of one particular women's team only

27.3% I am a fan of more than one women's team

16.1% I am a general fan of women's football without supporting a particular team

The growth in the women's game is reflected in how long supporters say they have been following their teams. Just over two-thirds of respondents **(68.4%)** have come to the women's game in the last five years, while over a third **(36.9%)** say they've supported their team for the last two years or less.

There is a growth in terms of those who are following only the women's game - in 2022 one in eight (12.6%) said they didn't follow a men's team; this year that figure is one in five (19.7%).

As in 2022, the top half of the WSL accounts for the most-supported teams from our respondents. Arsenal, Manchester United, Chelsea, Manchester City and Aston Villa were the most popular responses.

The only non-WSL team to crack the top 10 in terms of support were Newcastle United from the National League Northern Premier Division.

STAT: Which of the following options best describes you as a football supporter?

16.6% I only support my women's team

24.7% I support my women's team first, but also follow a men's team

30.1% I support my women's and men's teams equally

15% I support my men's team first, but also support my women's team

6.4% I support a men's team, and follow women's football generally

7.1% I am a general football fan

MATCHDAY ATTENDANCE

GOING TO THE GAME

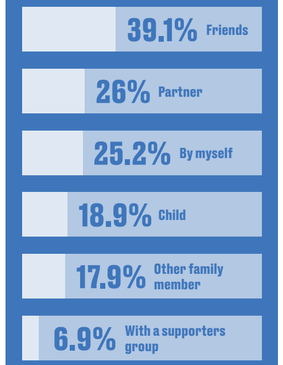
The majority fans filling in our survey are matchgoing fans - four out of five (82%) said they will have attended at least one home game in the 2023/24 season, a figure which is up on the 75.6% who said they attended at least one game when responding to our 2022 survey.

Almost half our respondents **(49%)** attend at least half their side's home games, and just over a third **(34.3%)** have a season ticket, which are broadly similar to our previous data.

The picture of growing crowds extends to away games, too.

Two-thirds of respondents **(67.6%)** had attended at least one away fixture this season, which is a slight increase on our 2022 data **(61.8%)**.

STAT: Who do you typically attend home games with?



BARRIERS TO ATTENDANCE

While the matchgoing contingent among our respondents was a healthy number, and slightly up on 2022's figures, we're keen to learn about the barriers to attendance that people face when trying to get to football.

We asked those who did not attend every home game for the three biggest barriers to increased attendance from a list of options.

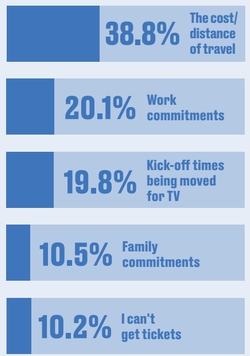
Thankfully, safety is not a major concern of our respondents - **93.4%** agreed that they felt safe attending women's football, and while only **0.5%** cited abusive chants as a barrier to further attendance, more than one in 10 **(11.7%)** said they had noticed an increase in the amount of homophobic, racist or sexist language at the match in recent years, a slight decrease on 2022's figure of **13.9%**.

Supporters also back the work being done by their clubs - seven out of 10 **(71.6%)** say their club does a good job in attracting fans, and more than three-quarters **(78.4%)** say that there is a vibrant fan culture at their club.

There is also broad support for allocated seating at women's games - almost half **(48.3%)** would back its introduction, while around one in five **(18.6%)** are against.

STAT: A quarter of fans (24.9%) said that access to players (e.g. to chat post match) is an important part of their matchgoing.

STAT: The greatest barriers to attendance are:



COST OF LIVING

The rising cost of living is a threat to clubs' matchday income - more than a third of respondents **(37.7%)** say that they have spent less than previously on items such as food and drink, programmes and raffle tickets as a result of the rising cost of living, with over a quarter **(28.3%)** saying they are attending fewer away games than in a typical season owing to rising costs.

Organised travel can help with the cost of attending away games, and the picture of how this is arranged at club level is mixed.

The most common situation is that there is no organised travel - **47.3%** of respondents reported that being the case at their club, offering one potential route to growing away following in the women's game.

Where there are travel arrangements, the most common is for an official supporters' club **(32%)** to organise it, however one in five fans **(18.7%)** reported that there was an independent supporter group organising travel to away games at their club.

ME AND MY CLUB

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The relationship between a fan and their club isn't just restricted to a handful of matchdays throughout the season, however; there are a whole range of interactions between fan and club that extend beyond the 90 minutes every other week - from dialogue with supporter groups to answering individual queries, ticketing and merchandise operations to communication through social media.

We will look to work with our members at club level to break down the data and highlight any particular issues that occur at individual clubs, but taken as a whole we are able to ascertain some useful insights into fans' relationships with their clubs and how that interaction is perceived from the supporters' point of view.

The vast majority of fans were unaware if their club had a Supporter Liaison Officer or other dedicated point of contact for fan issues - almost three-quarters **(71.2%)** were in the dark over this - suggesting that where these roles exist there is still work to be done to bring them to the attention of the wider fanbase.

The majority of fans were not members of official supporters' clubs where these exist - **32.2%** were members compared with **43%** who were not, and a similar gap occurred with independent supporter groups - **20.7%** were members while **31.5%** were not.

IMPROVEMENTS ON 2022

The reports from fans on their interactions with the club paints an improved picture since our last survey in 2022.

Only one in 20 **(4.8%)** fans rated their club as poor or very poor when it came to responding to queries from fans, down from **14.6%** previously.

Almost two-thirds **(63.7%)** were confident that their club would take complaints on a matchday seriously, with just **6.4%** not confident in their club's ability to deal with matchday issues, which represented a slight improvement in both figures from 2022.

STAT: Other indicators also show improvement in terms of how many fans rated their club positively.

83.5%

Value for money - 83.5%, up from 77%

Ticketing, ease of purchase - 75.2%, up from 70.1%

Ticketing, service time - 74.5%, up from 68.1%

Range of merchandise - 58.1%, up from 44.5%

REFEREEING

One of the areas that stood out from our 2022 findings was in regard to the standard of refereeing in the women's game - and those concerns remain, at least according to the respondents to our survey.

More than half the respondents **(55%)** disagree with the statement 'the standard of refereeing is acceptable in women's football'; and a quarter **(25.3%)** strongly disagree. Only a small minority **(7.7%)** strongly agree that refereeing standards are up to scratch, up from **5.8%** in our last survey.

Fans tend to agree that things are improving, however - twice as many fans polled (46.3%) agreed with the statement 'the quality of match officials has improved in recent seasons', than disagreed with it **(22.3%)**, and this will be something to track in future surveys.

Where fans don't agree is on criticism of referees. A third **(34.1%)** of fans agree that referees are unfairly criticised in the women's game, with a third **(35.7%)** disagreeing that criticism is unfair.

HOW SHOULD THE PROBLEM BE TACKLED?

There is still strong support that referees in women's football should be full-time professionals as in the men's game, with the proportion of fans in favour - **(88.9%)** - slightly up on 2022's findings.

Support for goalline technology has also grown - **83.1%** are in favour compared with **74.3%** previously.

VAR

Not all technology is widely welcomed, though. The introduction of VAR remains a contentious issue, with little change in the levels of support from our 2022 survey.

Despite its perceived issues and unpopularity in the men's game, there is still majority support for the introduction of VAR in women's football - just over half (54%) of fans said they would be in favour of introducing it, however a third (31.9%) oppose it.

Of those who experienced VAR at the Women's World Cup in Australia, where referees announced decisions over the in-stadium speakers, there was broad support for its continued use. Almost half **(46.4%)** said they would definitely welcome its introduction in future tournaments and women's games, with a further one-in-four **(25.7%)** probably in favour. Only one-in-10 **(10.1%)** opposed its continued use.

This all compares with our survey of 33,000 fans in 2021, where **95%** of fans who had experienced VAR in-stadium found it had made watching football less enjoyable.

FANS KNOW BEST?

Perhaps the issues around refereeing could be solved if more fans got involved? When faced with the statement 'I have a good knowledge of the laws of the game', nine-in-10 fans **(89.8%)** agreed.

However, when asked if they wanted to get involved in volunteering in a range of roles within the game, refereeing was the lowest of the options provided (just **6.4%)**, a long way behind club matchday volunteers **(33.6%)**, getting involved with their supporters' club committee **(22.7%)**, volunteering for the league **(15.9%)** or becoming a coach **(11.3%)**.

TV, BROADCAST AND MEDIA

In 2021 the WSL agreed a landmark TV deal, promising record investment and increased levels of visibility for the sport across two broadcasters - Sky Sports and BBC.

Now that we are approaching the end of this first major TV deal, we wanted to poll supporters on its effects, their views of the coverage, as well as the impacts it has had on the wider game, and to see what had changed from fans' initial reactions to the explosion of women's football on TV a couple of years ago.

If the aim was to get more eyes on the product, the TV deal is still having its desired effect, as fans are reporting watching more football on TV and through streaming. Just over half our respondents **(53%)** were either Sky subscribers, or had watched games on Sky.

Two-thirds **(63%)** say they are watching more than before, and the overall coverage, both on TV and in the wider media, is well received - a similar proportion **(65%)** say that the overall coverage of women's football in other media (radio, newspapers, online) has been better than before, and seven-in-10 **(71%)** say that TV coverage is better than before.

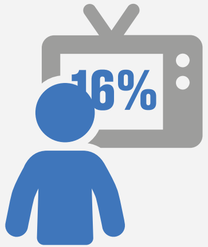
STAT: Those improvements notwithstanding, however, fans of the women's game still want more visibility - only around a third (31.6%) agreed that there is sufficient coverage of women's football in mainstream national media/TV, although this is a slight increase from 26% in 2022. A similar figure (32.7%) agreed there was sufficient coverage of their team in local media.

BROADCAST FOCUS

Around one-in-six of our respondents who had watched games on Sky Sports (16%) said that they had subscribed specifically because of Sky's women's football coverage, while three-quarters of respondents (74.1%) described themselves as regular viewers of BBC's women's football coverage.

Despite the huge positives to be gained from a wider audience and the broadly positive reaction of supporters to the broadcasters in terms of the knowledge/quality of pundits, commentators and their general coverage, however, the introduction of greater TV coverage has come at a cost for some supporters.

Mirroring the complaints in the men's game, eight-in-ten fans (79.7%) say that TV has too much say in when games kick-off, up slightly from 77.3% at the start of the deal.



STAT: 16% of fans said they had decided not to attend a game because they could watch it on TV.

SKY SPORTS

There was also growth in the proportion of disaffected fans - just over half (53%) agreed that they felt they were being priced out and were missing out on live games behind Sky Sports' paywall, up from 45.3% previously.

INTERNATIONAL

Our last survey came on the back of the Lionesses home Euros triumph, and the international scene in the women's game continues to go from strength to strength, as our Free Lionesses Fans' Embassy team made their way out to Australia to provide support for the travelling England fans at last summer's World Cup.

Only **2.8%** of fans said they didn't follow a national team, and the Lionesses were unsurprisingly the best represented of the home nations in our survey with nine-in-10 **(89.4%)** saying they followed England.

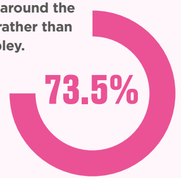
There was a big international contingent to our responses, too - more than one-in-10 respondents **(11.8%)** said they supported a non-home nations team, with Australia, Netherlands and USA being the most represented.

STAT: The popularity of the Lionesses is plain to see from our respondents - almost three-quarters of whom (72.1%) had seen their country play at least one home international fixture, and a quarter of whom (25.4%) had attended an away fixture or tournament

Not all fans were able to travel out to Australia, of course, but almost one-in-10 **(8%)** of our survey respondents had made the trip for at least part of the tournament.

The main obstacles to greater away attendance won't come as any surprise - seven-in-10 fans cited distance of travel **(72.2%)** and cost of travel and accommodation **(70.8%)** as the main reasons they didn't attend more away fixtures, along with almost half **(47.5%)** who found work commitments got in the way.

Three-quarters (73.5%) of fans agreed that England should commit to playing fixtures at grounds around the country rather than at Wembley.



The certainty around tournament dates into the future allows fans to make plans to travel, and one in five fans **(22.3%)** said they were intending on travelling to the women's Euros in Switzerland in 2025.

For more info on the FSA's work ahead of the Euros in Switzerland in 2025, and our Fans' Embassy service at away qualifiers and friendlies, be sure to follow the **@FreeLionesses** on Twitter and Instagram, where we share all our news and information ahead of each fixture.

The issue around late fixture announcements in the women's game was the fifth most cited reason for fans not attending more away games - one-in-8 (13.6%) found this problematic when trying to follow their national team overseas.

THE FUTURE OF THE GAME

Heading into the 2024/25 season there are a number of changes afoot at the top of the women's game, and we were keen to use our survey to see how much fans were aware of what was happening, and their views on the overall governance of the game.

THE CARNEY REVIEW

As background, out of the Fan-led Review of Football Governance in 2021 came the recommendation that a separate review was required of the women's game, and this was undertaken by Karen Carney MBE.

Her report, published in 2023, made 10 recommendations relating to the funding of the women's game, the "talent pathway", broadcast matters, diversity, access to facilities and grassroots funding, and more.

A recommendation from the Carney Review was for the women's game to work with the Premier League, EFL and broadcasters to carve out a dedicated slot for women's football. There was widespread support for this notion - nine-in-10 **(90.7%)** were in favour.

WHAT IS NewCo?

The FA set about exploring the idea of a new independent entity to be responsible for managing the professional women's game, a CEO working group was set up which involved clubs across the WSL and Championship and in December 2023 those clubs voted for the new organisation, New Co, to be established.

STAT: While it was big news in the women's game, four-in-10 fans (39.9%) said they were largely unaware of the creation of NewCo, and the changes for the 2024-25 season onwards. One-in-six (15%) said they had paid close attention to the founding of NewCo.

Revenue sharing to help with the lower levels of the game was a key concern of respondents - **81.2%** were in favour of support from the top two levels for the Women's National League - along with a similar proportion in favour of rules to ensure that clubs are run sustainably and not spending beyond their means **(85.1%)**.

Democracy was a key concern, too - three-quarters **(76.2%)** of respondents said that Championship clubs should have an equal say alongside WSL clubs in decision making, and six-in-10 **(61.4%)** said they were concerned about the potential for the concentration of power at the top WSL clubs.

At this stage, the majority of fans **(66.9%)** remain to be convinced one way or another about whether they trust NewCo as new administrators of the game. One-in-five supporters **(22.3%)**, meanwhile, said they trusted the new regime, with only one-in-10 **(10.9%)** saying they did not trust NewCo.

The FSA is working heavily with the NewCo team to ensure supporters are at the heart of the organisation.

AND THE REST...

We hope this report has given you a sense of where supporter sentiment stands in 2024 on a range of the key issues which face the game.

Our benchmark from 2022 has given us a useful steer on the direction of travel on supporter opinion on a range of key issues, and gives us much food for thought when it comes to discussions with our members over our campaign priorities for the months and years ahead.

We will not only be sharing our findings with our members, however, but also the key stakeholders in the game - NewCo, the FA, PGMOL and others - to provide vital information on the areas of work that those bodies are responsible for, as well as helping ensure that the fans' voice is heard on the things that matter most to us.

Not everything we polled supporters on fits neatly into the various headings we've given in the course of this document, however, so here are a bunch of other findings from our data that we wanted to share with you.

DIVERSITY

Almost half of supporters **(44.4%)** said their club needs to do more to support diversity and inclusion in the women's game, with only half **(49.5%)** agreeing that the make-up of the crowd at their club reflects the general population of the area around it.

One-in-five of our respondents **(19.6%)** were gay/lesbian, and a further one-in-10 **(10.1%)** identified as bisexual.

Six-in-10 of those fans who identified themselves as having a disability said they thought women's football was accessible for people with disabilities, compared with **11.3%** who disagreed.

RELATIONSHIP WITH THE MEN'S GAME

There is still strong support for the redistribution of money from the men's game to support the growth of the women's game - **84.1%** said there should be more money provided, a similar proportion **(86.7%)** would like to see the gap in prize money between the men's and women's FA Cup reduced.

Not all fans agree on all things, however - opinion was split on whether women's teams should be independent of their men's equivalent. A third **(36.1%)** are in favour, while a third **(36.7%)** are opposed.

Where fans did agree, however, was that the majority (79%) felt the way their men's team treats its women's team is important to them and affects their level of support for their men's team.

MISCELLANEOUS

A third of our respondents **(32%)** play the game at some level. A further **15.2%** are involved in coaching.

One-in-10 of our respondents **(10.3%)** lived overseas.

Two-thirds **(64.1%)** of respondents are in favour of fan ownership in the women's game.

!@#!@

More than half of fans (58.9%) had problems with fans holding up signs requesting shirts, etc, from players.

WOMEN'S GAME STRATEGY

DOWNLOAD THE FSA'S WOMEN'S GAME STRATEGY DOCUMENT AT thefsa.org.uk/womens-strategy-2024-27

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